

Recent IPO Updates:

FII/DII Activity (in ₹crores)	
FII (Cash)	-3,077.59
DII (Cash)	2,469.34
FII (Index Futures)	-2,390.34
FII (Stock Futures)	-3579.18
FII (Index Options)	9,933.28
FII (Stock Options)	-256.93

Global Market Snapshot	
Dow Jones	47,522.12 (▼ -0.16)
S&P 500	6,890.59 (▲ 0.23)
Nasdaq	23,958.47 (▲ 0.80)
Gift Nifty	26,022.50 (▲ 0.63)
Nikkei 225	51,325.61 (▲ 2.17)
Hang Seng	26,282.69 (▲ 0.43)

- India's primary market is expected to raise a record Rs 76,000 crore in IPOs this November, led by marquee firms such as Groww, Lenskart and boAt, signaling a blockbuster fundraising period.
- Fintech unicorn Groww is targeting an approximate ₹61,736 crore valuation with its forthcoming ₹6,632 crore IPO. The issue includes fresh equity and an offer for sale.
- Edtech firm PhysicsWallah is reportedly preparing to launch its Initial Public Offering soon, which is expected to be a significant offering worth around ₹3,820 crore.
- BCCL's pre-IPO roadshows across cities have attracted strong investor interest. SEBI approved DRHPs for BCCL and CMPDIL. Coal production targets remain on track for FY26.
- Lenskart Solutions' anchor book for its ₹7,278 crore IPO was overwhelmingly subscribed 20 times, receiving massive demand of ₹68,000 crore from global and domestic institutional investors.
- Curis Lifesciences Limited is launching its SME IPO from November 7 to 11, raising ₹25.80–27.52 crore in a fresh issue to fund capital expenditure and working capital.
- General Atlantic invested a significant \$600 million (₹5,000 Cr approx.) into PhonePe through a pre-IPO secondary transaction, doubling its stake and signaling strong confidence.

P.E. & Funding Updates:

- DP World, a global logistics major, pledged an additional \$5 billion investment in India at Maritime Week to strengthen the supply chain, infrastructure and multimodal connectivity.
- Fintech startup Snapmint raised \$125 million, led by General Atlantic, primarily for capitalizing its in-house NBFC and scaling up its EMI financing platform.
- Proptech startup Openhouse has secured \$2 million in funding from investors to digitize and simplify India's home resale market through AI-driven pricing and marketplace tools.

Macro Data		
Brent Crude	\$64.37	(▲ 0.81)
Gold	₹121,650.00	(▼ -0.28)
Silver	₹148,940.00	(▼ -0.06)
Dollar Index	99.5	(▲ 0.44)
INR/USD	88.71	(▼ -0.07)
India 10Y Bond Yield	6.53	(▲ 0.00)
US 10Y Bond Yield	4.1	(▲ 2.51)

Indian Market		
BSE Sensex	84,404.46	(▲ 0.44)
NIFTY 50	25,877.85	(▲ 0.45)
BSE SENSEX 50	27,018.65	(▲ 0.43)
NIFTY NEXT 50	70,082.55	(▲ 1.42)
BSE SENSEX Next 50	87,040.71	(▲ 1.05)
NIFTY BANK	58,031.10	(▲ 0.29)
BSE BANKEX	65,298.12	(▲ 0.33)
NIFTY FINANCIAL SERVICES	27,376.00	(▲ 0.49)
BSE FINANCIAL SERVICES	13,050.63	(▲ 0.21)
NIFTY MIDCAP SELECT	13,467.65	(▲ 0.48)
BSE MIDCAP	47,306.37	(▲ 0.68)
INDIA VIX	12.07	(▲ 0.17)

- Vijya Fintech, parent of MIDASX, raised Rs 12 crore seed round to expand AI-driven multi-asset marketplace, enhancing tech, team and operations nationwide. Anil Gupta leads AI innovation.
- Redacto, an AI-driven privacy startup, raised Rs 12 crore in seed funding to expand its product, engineering teams and scale enterprise adoption amid new Indian data protection laws.
- Beyond Renewables & Recycling raised pre-seed funding led by Momentum Capital to scale solar panel recycling tech, addressing India's growing solar waste and promoting sustainability.
- Bengaluru-based Exiles Interactives raised \$355,000 pre-seed to develop Centarius, a browser-native social gaming platform, focusing on quality, community and competitive gameplay.

Business & Economic Updates:

- The government is imposing a 30% import levy on yellow peas starting November 1 to discourage cheap imports and protect the interests of domestic pulse farmers.
- India recorded a 108% jump in new company registrations in September, reflecting strong entrepreneurial activity and revived business sentiment across key sectors.
- Following \$17 billion in foreign portfolio outflows, India is accelerating financial reforms, focusing on green finance and broader market access to attract sustainable capital inflows.
- Worldline India reported a 35% rise in UPI transactions during the first half of 2025, with merchant payment volumes growing 37%, underscoring continued digital adoption momentum.
- IRDAI chief Ajay Seth stated the insurance sector is in an unstable equilibrium, citing muted growth and tough competition from other savings pools, urging an orderly transition.
- Reliance Jio partnered with Google to offer eligible 5G users 18 months of the premium Google AI Pro plan, valued at ₹35,100, as part of its "AI for All" vision.

By
India IPO

- Assocham urged the government to ease direct tax measures in the upcoming Budget to spur investor confidence, recommending simpler compliance and reviving the 15% concessional tax.
- Piyush Goyal stressed the urgent need for export diversification to counter the current volatile global environment and the high US tariffs placed on various Indian products.
- SEBI approved the phased restructuring of Nifty Bank and other banking stock indices by March 2026 to enhance market stability and prevent manipulation.
- Foreign Portfolio Investors (FPIs) signaled a comeback by investing over ₹3,200 crore in Indian stocks, driven by improved valuations and stronger corporate earnings prospects.
- The CAG urged Indian states to emulate Odisha's model by creating a Budget Stabilization Fund to build fiscal buffers against unforeseen revenue shocks and economic crises.
- India's overall engineering exports grew in September, yet shipments to the US, the largest market, fell 9.4% due to the punitive tariffs imposed by the Trump administration.
- Agriculture Minister Shivraj Singh Chouhan mandated that at least 5,000 FPOs achieve a sales turnover of ₹1 crore or more by FY26, seeking to boost their viability and business prospects.
- China granted licenses to "some Indian companies" to import crucial rare earth magnets, easing previous restrictions amid ongoing efforts to normalize strained bilateral relations.
- A report predicts India's gaming and interactive media sector will surge to \$7.8 billion by FY30, driven by the rise of in-app purchases, esports and new formats like micro-dramas.
- India's GST collections hit a robust ₹1.89 lakh crore in September, showcasing resilient domestic demand despite a major structural rationalization that slashed tax rates.

- The RBI announced measures to internationalize the Rupee, permitting cross-border INR lending to neighbors and enabling Special Rupee Vostro Accounts to invest in corporate debt.
- The Center urged banks to double the Micro Enterprise Card (ME-Card) rollout target this year to provide faster working capital access to eligible MSMEs registered on the Udyam portal.
- According to NITI Aayog's latest report, Telangana has emerged as India's fastest-growing service economy, driven by IT exports, financial services and infrastructure-led growth.

Geopolitical Updates:

- India is supporting Afghanistan's plan to construct a dam on the Kunar River. This move underscores India's commitment to Afghanistan's sovereignty amidst its ongoing border tensions with Pakistan.
- India has successfully secured another six-month extension on US sanctions for the Chabahar Port in Iran, which is crucial for trade access to Afghanistan and Central Asia.
- China has granted licenses to certain Indian companies for the import of rare earth magnets, providing relief after earlier trade curbs and easing supply chain concerns.
- Presidents Trump and Xi agreed to a one-year trade truce at the APEC summit, preventing further tariff escalation, settling the rare earth mineral dispute and resuming US soybean purchases.
- President Trump cut fentanyl-related tariffs on Chinese imports by 10% after meeting President Xi, signaling a de-escalation in trade tensions and securing rare earth access.
- Pakistan and Afghanistan will resume peace talks in Istanbul next week, mediated by Turkey and Qatar, aiming to ease tensions after recent deadly border clashes.

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